



A network of **San Diego professional advisors** dedicated to **building relationships** and **integrating charitable planning** as a strategy for achieving clients' overall goals.

Individuals can make a difference;
together we change the world.

Who We Are

Since 1967, the Jewish Community Foundation of San Diego has engaged, educated and inspired generations of givers throughout the Jewish and secular communities.

The Foundation manages over \$700M in assets and has facilitated more than \$1.8B in grants.

The Foundation is a national model for community and individual endowment building and youth philanthropy programs.



(858) 279-2740 / jcfsandiego.org/TCA

Partnering with Advisors

The Jewish Community Foundation San Diego has a long history of working with Attorneys, Accountants, Financial Advisors and Wealth Managers, providing them with tools to engage their clients in charitable conversations to enhance their relationships.

Professional Advisor Resources

- Dedicated advisor web page
- Presentations at advisors' firms
- Charitable gift projections
- Nonprofit research for clients
- Participation in client or family meetings

Benefits

Now in its 7th year! The Foundation offers the Trusted Charitable Advisor (TCA) program to advance charitable planning and to further strengthen our partnership with the San Diego professional advisor community.

Over lunchtime workshops, professional advisors meet and learn from philanthropy professionals and colleagues to discuss approaches to strengthening their client relationships.

Program Highlights

- **Attend** four Trusted Charitable Advisor luncheon workshops
- **Recognition** as a Trusted Charitable Advisor in Foundation publications and website
- **Develop** customized materials for your firm to lead charitable conversations
- **Connect** with other charitably-minded advisors
- **Learn** about emerging trends in philanthropy
- **Participate** in training for enhanced charitable planning
- **Receive** a complimentary ticket to the Annual Professional Advisor Event and TCA Happy Hour for all graduates

Workshop Topics

The Philanthropic Landscape

- Why is philanthropy different today?
- How has technology influenced giving?
- What can we expect in the next decade?
- Who are the next generation of givers?



Listen and Learn

- Philanthropy in your practice
- Developing a dialogue of trust
- Being a good listener for charitable triggers
- Creating relationships through stories



Inspire and Engage

- Language of philanthropy
- Multi-generational family meetings
- Planned giving conversations



What You Need To Know

- Charitable giving vehicles and options
- Understanding philanthropy and the law
- Leveraging tax advantages



Giving
A way of life.

Workshop Details

All workshops include catered lunch, are from 12:00 noon to 2:00 pm, and held in-person at the Jewish Community Foundation. CFP® credit will be offered.

The Philanthropic Landscape

Tuesday, June 20, 2023

Listen and Learn

Tuesday, July 18, 2023

Inspire and Engage

Tuesday, August 22, 2023

What You Need To Know

Tuesday, September 19, 2023

Annual Professional Advisor Event

The Jewish Community Foundation offers an annual high-level event for advisors to learn about new developments in charitable planning. This luncheon is open to all advisors and typically offers continuing education credit for Attorneys, Accountants and Financial Advisors.

How to be recognized as a Trusted Charitable Advisor

Complete the four workshops presented by the Jewish Community Foundation. To maintain recognition, a TCA must meet with Foundation staff or attend at least one Professional Advisor event annually.

Participation Cost: \$180

For more information and to register, please contact the Jewish Community Foundation:

Sharleen Wollach, Chief Impact Officer
sharleen@jcfsandiego.org / (858) 279-2740 x110
jcfsandiego.org/TCA

 **Jewish Community Foundation**
San Diego

4950 Murphy Canyon Road, San Diego, CA 92123
(858) 279-2740 / www.jcfsandiego.org